

ADAPT 2025 Outlook

Forging the Future: CIO Priorities for Digital Resilience in Mining, Energy, and Utilities

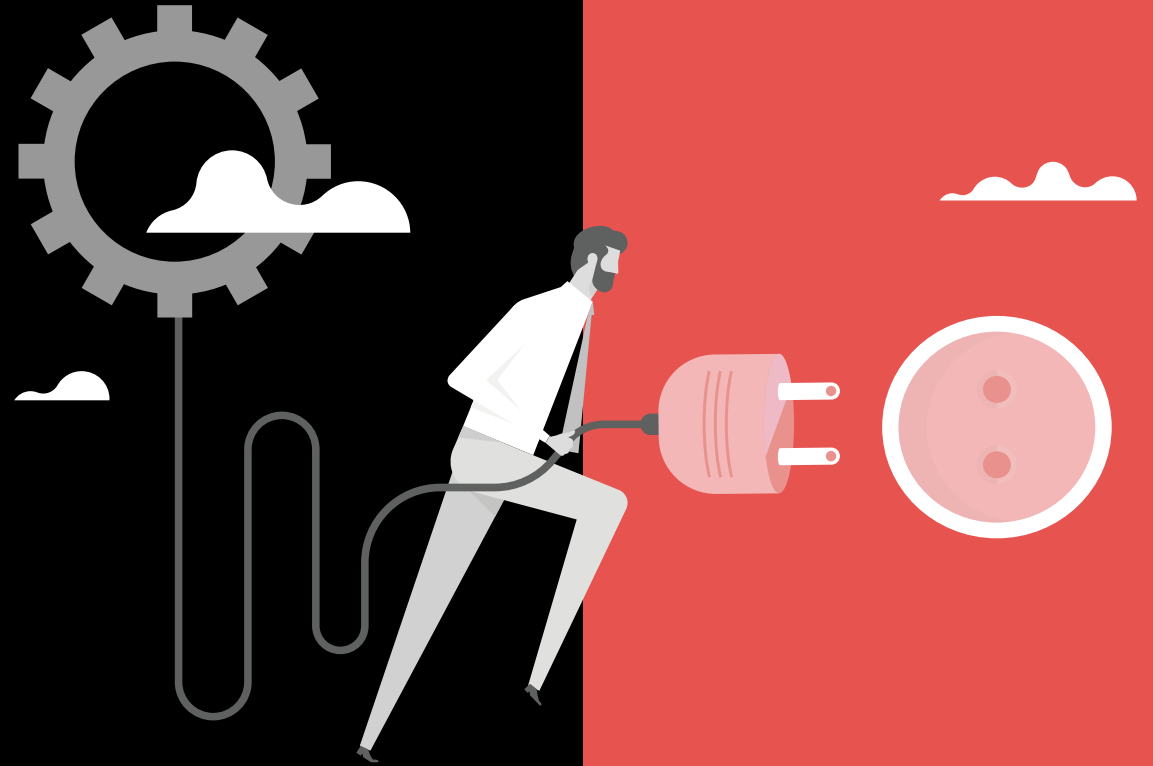


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Executive summary



ADAPT's 2025 Outlook

Heavy Industries

Persona in focus

Australian CIOs and their senior IT and operational leaders

Target Audience

**Empowering the Australian C-suite,
primarily CIOs across government services.**

This report equips CIOs in mining, manufacturing, utilities, transport, and industrial services with strategic insight into evolving technology priorities, cost pressures, and workforce demands. The focus is on driving operational efficiency, modernisation, and resilience at scale.

Heavy industry CIOs can use this outlook to benchmark technology goals, validate investment decisions, and guide legacy remediation and infrastructure upgrades.

Technology providers can identify areas to add value through legacy modernisation, secure systems integration, cloud-enabled operations, and workforce enablement.

How to use this report



Improve operational resilience and reduce cost exposure

Heavy industry CIOs face rising input and labour costs while operating in high-risk, asset-intensive environments. Investments in automation, predictive analytics, and legacy modernisation are critical to maintaining uptime and cost efficiency.



Strengthen workforce capability and domain alignment

CIOs are investing in upskilling internal teams to bridge IT-OT gaps. Retaining talent with domain-specific expertise is essential for embedding technology into frontline industrial operations.



De-risk operations through data and infrastructure modernisation

Industrial leaders are replatforming legacy systems, deploying real-time monitoring, and building resilient hybrid cloud environments to reduce unplanned downtime and improve decision-making.

ADAPT's key findings: Heavy industries CIOs

Heavy industry CIOs are prioritising operational resilience, workforce capability, and digital integration.



Operational effectiveness is the top goal

CIOs in mining, manufacturing, and utilities are laser-focused on improving cost efficiency, uptime, and end-to-end visibility. Technologies like AI, IoT, and predictive analytics are core to streamlining operations.



Workforce retention and training are strategic imperatives

18% of CIO budgets are allocated to people — the highest share across sectors. Upskilling teams in OT-aware IT roles is critical to meet industrial needs and combat rising labour costs.



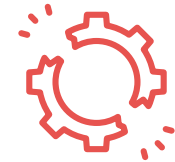
Legacy system remediation is a top investment

CIOs are prioritising the modernisation of legacy platforms to eliminate risk, enable secure operations, and meet performance needs. Refactoring and cloud migration are key strategies.



Underinvestment in customer-facing platforms

Heavy industry CIOs are spending less on customer portals and apps. This gap presents a major opportunity to differentiate via better service delivery and user experiences — especially in transport and construction.



Innovation is tied to operational gains, not moonshots

Unlike consumer sectors, innovation in heavy industry is grounded in tangible ROI — reducing downtime, enabling automation, and enhancing asset performance — rather than breakthrough disruption.

Heavy industries: Goals in 2025

Organisational goals according to heavy industry services CIOs in 2025

Heavy industry goals in 2025	
1	Improving operational effectiveness
2	Optimising costs
3	Acquiring and retaining customers
4	Building a secure and trusted organisation
4	Tech modernisation and simplification
6	Developing the AI strategy and roadmap
7	Creating new revenue and business models
8	Attracting and retaining talent
9	Digitisation and automation of key processes
10	Pursue broad-based digital transformation

All CIO goals in 2025	
1	Tech modernisation and simplification
2	Optimising costs
3	Improving operational effectiveness
4	Acquiring and retaining customers
5	Building a secure and trusted organisation
6	Developing the AI strategy and roadmap
7	Digitisation and automation of key processes
8	Pursue broad-based digital transformation
9	Creating a data-driven organisation
10	Creating new revenue and business models

Heavy industry CIOs: Goals in 2025

In 2025, heavy industry CIOs are targeting operational effectiveness, workforce resilience, and legacy modernisation — all while navigating cost pressures and industrial complexity.

Key goals



Operational effectiveness

Operational efficiency is business-critical

- Ranked the #1 goal by heavy industry CIOs, improving uptime, asset performance, and process efficiency is paramount across mining, manufacturing, and utilities.
- Predictive analytics and IoT are increasingly used to anticipate equipment failures and reduce costly downtime.
- BHP implemented AI-based predictive maintenance across its Western Australian iron ore operations in 2024, reducing unplanned outages by 30% and improving asset life cycles. ([Source](#))



Optimising costs

Cost optimisation remains a constant pressure

- A top-2 goal across the sector, CIOs are leveraging automation, cloud migration, and process digitisation to lower TCO and reduce manual inefficiencies.
- In 2023, South32, a leading mining and metals company, successfully migrated its SAP systems to Microsoft Azure. This strategic move consolidated and simplified their data estate, leading to improved operational efficiency and scalability. ([Source](#))



Workforce upskilling

Workforce upskilling and talent retention is a differentiator

- With 18% of budgets going to people, CIOs are prioritising reskilling programs to bridge IT-OT knowledge gaps and retain specialised talent.
- In July 2024, Amazon Web Services (AWS) entered a \$2 billion agreement with the Australian government to develop a sovereign cloud environment for Defence and National Intelligence agencies. This initiative is projected to create up to 2,000 Australian jobs, enhancing national security infrastructure and fostering local employment opportunities ([Source](#))



Acquiring and retaining customers

Customer-facing technology is a missed opportunity

- Ranked lower as a goal, CIOs underinvest in digital customer platforms — yet this presents an avenue for differentiation in transport, construction, and industrial services.
- In October 2024, Transport for NSW expanded its digital transformation partnership with HCLTech to enhance customer experiences. This initiative underscores the potential benefits of investing in digital customer platforms within the transport sector. ([Source](#))

Initiatives to deliver on goals for heavy industries CIOs for 2025

Heavy industry initiatives for 2025	
1	Application modernisation and integration
2	Bolster overall cyber security
3	Streamline and enable processes
4	Modernise mission-critical workloads
5	Infrastructure modernisation
6	Embed automation and foundational AI
7	Evolve strategic sourcing and vendor management
8	Multi-cloud migration and unification
9	Data analytics and visualisation
9	Upskill and retain staff

All CIO initiatives for 2025	
1	Application modernisation and integration
2	Bolster overall cyber security
3	Modernise mission-critical workloads
4	Streamline and enable processes
5	Embed automation and foundational AI
6	Infrastructure modernisation
7	Improve the omnichannel experience
8	Operating model evolution
9	Data consolidation and integration
10	Pilot and adopt generative AI



CIOs are prioritising remediation, people, and cloud platforms to unlock resilience and agility.

Key initiatives	How is the Australian heavy industries sector adapting to the change?
Application modernisation and integration	In 2024, South32 migrated its SAP environment to Microsoft Azure, consolidating critical systems and enabling faster, more resilient decision-making across global mining operations. The move supports long-term IT simplification and performance uplift. (Source)
Bolster overall cyber security	In October 2024, the Australian government introduced the Cyber Security Bill 2024, mandating resilience standards across industries. This legislation is pushing mining, utilities, and industrial firms to rearchitect cyber strategies to meet evolving compliance needs. (Source)
Streamline and process enablement	In January 2025, Telstra and Accenture announced a joint venture aimed at accelerating Telstra's data and AI roadmap. This collaboration focuses on reinventing business processes through new AI capabilities, enhancing customer experiences, and improving operational efficiency. By integrating advanced AI technologies, Telstra aims to streamline operations and enable more efficient processes across its services. (Source)
Enable automation and foundational AI	In early 2024, BHP announced it was scaling its use of AI across maintenance and asset optimisation. Through strategic partnerships with Microsoft and other vendors, BHP is embedding AI into core operations to improve equipment uptime and lower OPEX. (Source)
Strategic sourcing and vendor management	The Australian government's Digital Transformation Agency (DTA) has simplified strategic sourcing by managing marketplaces and contracting arrangements that reduce costs and promote innovative solutions. This initiative aids government agencies in achieving optimal outcomes from digital and ICT investments, ensuring efficient use of taxpayer resources. (Source)



Modernisation, AI, and cyber security offer the highest return across complex industrial environments.

Key initiatives	High impact areas for key areas for Australian heavy industries organisations
Application modernisation and integration	<ul style="list-style-type: none">• System unification: Integrating siloed ERP, EAM, and production platforms to reduce redundancy and streamline workflows.• Operational safety: Connecting OT (Operational Technology) systems with IT for real-time monitoring and response.• Risk reduction: Phasing out legacy SCADA and PLC systems vulnerable to failure or cyber threats.
Bolster Overall Cyber Security	<ul style="list-style-type: none">• Critical infrastructure defence: Securing mining, energy, and logistics networks under the SOCI Act.• Vendor alignment: Enforcing cyber security standards across supply chain partners.• Cyber awareness uplift: Establishing operational cyber drills and incident response readiness in field sites.
Streamline and process enablement	<ul style="list-style-type: none">• Automation of repetitive field ops: Digitising manual forms, inspections, and permit workflows across construction and utilities.• Real-time operations: Enabling connected asset monitoring and predictive maintenance to minimise downtime.• Supply chain visibility: Creating end-to-end digital workflows from procurement to delivery.
Enable automation and foundational AI	<ul style="list-style-type: none">• Asset optimisation: Using AI to forecast equipment failure, energy usage, and fleet efficiency.• Autonomous operations: Enabling remote or AI-assisted mining and logistics in hazardous zones.• Document intelligence: Automating invoice reconciliation, safety audits, and regulatory reporting.
Strategic sourcing and vendor management	<ul style="list-style-type: none">• Contract transparency: Centralising procurement systems to track vendor performance and compliance.• Sustainable sourcing: Embedding ESG metrics into supplier selection and reporting.• Cost rationalisation: Using analytics to consolidate vendor base and renegotiate underperforming contracts.






Australian firms are deploying scalable, validated use cases to modernise operations and reduce cost.

Key initiatives	Market activity	
Application modernisation and integration		<ul style="list-style-type: none">In 2024, Roy Hill partnered with Insight to build its Azure and AI platforms to deliver an integration platform and manage their Microsoft Enterprise License agreement. This strategic partnership aimed to enhance Roy Hill's technological capabilities, enabling more efficient operations and data management. (Source)
Bolster overall cyber security	 Australian Government	<ul style="list-style-type: none">In October 2024, the Australian government introduced the Cyber Security Bill 2024, marking a major evolution in national cyber defence policy. The bill builds on the existing Security of Critical Infrastructure (SOCI) Act, expanding its scope to address evolving threat landscapes, including ransomware and supply chain vulnerabilities.Heavy industry players now face higher compliance thresholds and must invest in threat detection, response automation, and secure-by-design systems. It also emphasises third-party vendor assurance — requiring tighter scrutiny of ICT suppliers and operational partners.This shift is prompting CIOs across the sector to revisit cyber security roadmaps, embed resilience into digital transformation, and conduct sector-specific cyber drills. Overall, the Bill is seen as both a compliance challenge and a strategic catalyst for lifting Australia's industrial cyber posture. (Source)

Australian firms are deploying scalable, validated use cases to modernise operations and reduce cost.

Key initiatives	Market activity	
Streamline and process enablement		<ul style="list-style-type: none">MASPRO is an Australian engineering company specialising in mining equipment solutions, contributing to the country's heavy industry. In 2024, MASPRO leveraged automation to enhance the efficiency of their manufacturing processes. By integrating advanced automation technologies, they achieved higher precision in component production, reduced lead times, and improved overall operational efficiency. This strategic move not only optimised their internal workflows but also enabled them to deliver premium engineered solutions more effectively to the mining sector. (Source)
Enable automation and foundational AI		<ul style="list-style-type: none">St Barbara's collaboration with Stratum AI. In May 2024, St Barbara, an Australian mining company, announced plans to boost gold production at its Simberi mine in Papua New Guinea by using AI-driven algorithms to classify mineralisation. This initiative led to the identification of CIL treatable sulphides, previously considered unsuitable for the existing CIL circuit, thereby enhancing operational efficiency and resource use. (Source)
Strategic sourcing and vendor management		<ul style="list-style-type: none">In November 2024, the PASA Conference brought together Australia's leading procurement leaders to spotlight the next frontier in sourcing strategy. There was a strong emphasis on improving transparency across Tier 1 and Tier 2 suppliers — particularly in construction, mining, and logistics.Digital procurement platforms and risk scoring tools are being adopted to track vendor performance against ethical and sustainability benchmarks. The shift is also aligned with broader regulatory and investor expectations around responsible supply chain practices.CIOs and CPOs are now working together to modernise vendor data infrastructure, automate compliance tracking, and strengthen sourcing agility. This reflects a strategic evolution — moving procurement from a cost centre to a critical enabler of operational resilience and brand trust. (Source)

Local innovators are reshaping automation, asset intelligence and security in heavy industry.

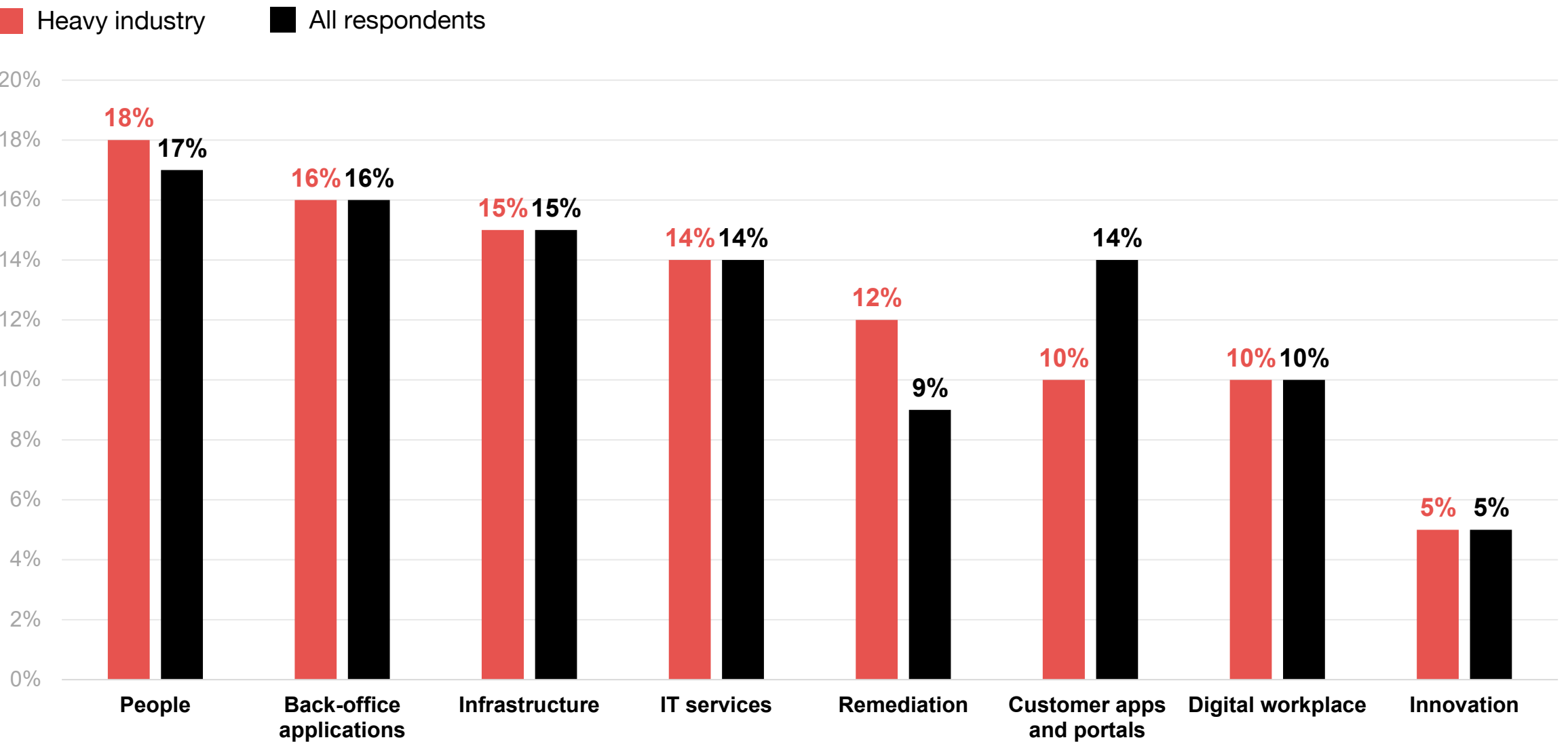
Key initiatives	Market activity	
Application modernisation and integration	 an IBM Company	Neudesic Accelerates cloud-native app modernisation and AI integration for legacy-heavy industries expanding into Azure ecosystems.
Bolster overall cyber security		CyberCX Australia's leading cyber firm offering end-to-end security services tailored to protect critical infrastructure and OT environments.
Streamline and process enablement		Fleet Space Technologies Deploys AI-powered, satellite-enabled seismic sensors (ExoSphere) to dramatically speed up mineral exploration and reduce field costs.
Enable automation and foundational AI		Applied EV Builds AI-driven, autonomous electric vehicles to replace manual operations in hazardous and high-repetition industrial settings.
Strategic sourcing and vendor management		Caliba Group Delivers cost savings through procurement transformation and smarter supplier management tailored to heavy industry clients.

Heavy industry CIOs must align digital strategy with evolving safety, compliance, and localisation mandates.






Regulatory development	Call to action for heavy industries organisations CIOs	Timeline
Heavy Vehicle National Law (HVNL) Reforms	Prepare for changes in heavy vehicle regulations by updating compliance protocols and ensuring fleet operations align with new standards.	Implementation expected in late 2024.
Offshore petroleum and greenhouse gas storage (Safety) regulations 2024	Enhance safety management systems to comply with updated offshore safety regulations, focusing on worker health and environmental protection.	Effective from 12 June 2025.
Ban on engineered stone	Cease the use, supply, and installation of engineered stone materials to comply with new health and safety regulations aimed at preventing silicosis.	Effective from 1 January 2025.
Future made in Australia Act	Align business strategies to leverage government initiatives promoting local manufacturing and resource processing, particularly in the clean energy sector.	Legislation introduced on 11 April 2024.

CIO budgets and investments for the next 12 months

Government services CIO IT budgets segmentation for the next 12 months



Heavy industry CIOs are doubling down on people, remediation, and digital infrastructure to enable transformation at scale.



 People (18%)	 Remediation (12%)	 Customer Apps and portals (10%)	 Back-office applications (16%)	 Infrastructure (15%)
<ul style="list-style-type: none"> Heavy industry CIOs are prioritising workforce upskilling and retention, especially in cloud, OT security, and automation. Talent shortages and OT-IT convergence make skilled labour essential for large-scale transformation. 	<ul style="list-style-type: none"> Heavy industry leads in remediation spending, highlighting the urgent need to retire legacy systems. Outdated tech increases cyber risk, hinders automation, and limits visibility in SCADA, logistics, and plant control. 	<ul style="list-style-type: none"> Heavy industry CIOs underinvest in customer-facing platforms, lagging the 14% cross-sector average. Poor digital experiences in construction, utilities, and transport erode trust and delay delivery. 	<ul style="list-style-type: none"> Outdated ERP, HR, and procurement systems hinder efficiency, driving investment in consolidation. Modern platforms improve decision-making, visibility, and compliance with ESG and safety standards. 	<ul style="list-style-type: none"> Budgets prioritise rugged, scalable infrastructure for remote and low-connectivity sites, ensuring uptime, safety, and real-time data for AI and automation.
<ul style="list-style-type: none"> For CIOs: Invest in targeted training programs, build pathways for operational staff to transition into tech-enabled roles, and focus on retaining domain experts through flexible, hybrid models. 	<ul style="list-style-type: none"> For CIOs: Prioritise remediation for high-risk systems, adopt modular replacements over lift-and-shift, and embed cloud-readiness into the remediation roadmap. 	<ul style="list-style-type: none"> For CIOs: Modernise client-facing portals for transparency, enable mobile-first project visibility, and embed secure self-service options for partners and contractors. 	<ul style="list-style-type: none"> For CIOs: Move to cloud-based ERP with embedded analytics, automate vendor workflows, and ensure alignment with ESG and carbon accounting requirements. 	<ul style="list-style-type: none"> For CIOs: Invest in hybrid-ready networks, edge computing for operational zones, and cyber-hardened infrastructure to support mission-critical functions.

Heavy Industry CIOs investment priorities for the next 12 months




Heavy industry investment priorities for next 12 months	
1	Modernising legacy applications
2	Application integration
3	Cloud cost management and optimisation
4	Enterprise architecture
5	Data governance
5	Cybersecurity skills, awareness and engagement
7	Application security testing
7	IT cost visibility and optimisation
9	API management
9	Identity and access management

All CIO investment priorities for next 12 months	
1	Application integration
1	Modernising legacy applications
3	Enterprise architecture
4	API management
5	Data governance
6	Cloud cost management and optimisation
7	IT cost visibility and optimisation
7	Generative AI
9	Cyber security skills, awareness and engagement
10	IT services management

Australian heavy industries are prioritising legacy system overhaul and cloud efficiency to enable real-time operational agility.

Key investment priorities	ADAPT's market observation
Modernising legacy applications	<div></div> <ul style="list-style-type: none">In March 2025, the Weir Group, a global mining equipment provider, acquired Australian software company Micromine for £657 million. This strategic move aims to enhance Weir's digital capabilities, integrating advanced technology solutions across the mining value chain, from exploration to operations. The acquisition reflects a significant step in modernising legacy systems and integrating applications within the mining sector. (Source)
Cloud cost management and optimisation	<div></div> <ul style="list-style-type: none">CS Energy modernised its operations in 2024 by integrating AVEVA PI across thermal and renewable sites. The unified data system cut inefficiencies tied to duplicated infrastructure and disparate data platforms. It streamlined demand forecasting, load management, and asset use in real-time.This enabled more cost-effective operations while maintaining system reliability across plants. The cloud-backed architecture reduced data silos and improved cost transparency. CS Energy's move reflects how cloud optimisation is being driven by both cost control and agility needs. (Source)

CIOs are enhancing data governance, cyber skills and application security to strengthen digital resilience.

Key investment priorities	ADAPT's market observation	
Data governance		The Australian Energy Market Operator (AEMO) and AusNet Services are collaborating on the Consumer Energy Resources (CER) Data Exchange project. This initiative focuses on designing functions, data governance, and business models to facilitate efficient data exchange between organisations, aiming to enhance data governance practices within the energy sector. (Source)
Cyber security skills, awareness, and engagement		In October 2024, the Tech Council of Australia , in partnership with companies like WiseTech, Commonwealth Bank, and NBN Co, launched a forum to double the tech workforce to 1.2 million by 2030. This initiative addresses the tech worker shortage, aiming to bolster cyber security skills across industries, including heavy industries, to counter cyber threats effectively. (Source)
Application security testing		In response to increasing cyber threats, Melbourne Airport partnered with Cloudflare to enhance its cyber security infrastructure. By deploying Cloudflare's Web Application Firewall (WAF), the airport secured its externally exposed URLs and restricted problematic traffic from inappropriate international sources. This initiative streamlined their complex cyber security infrastructure and mitigated potential Distributed Denial of Service (DDoS) attacks, ensuring uninterrupted services for travelers. (Source)

To modernise safely and at scale, CIOs must act across systems, skills, security and supplier strategy.

Key recommendations for heavy industry CIOs:



Heavy industry CIOs should modernise legacy operational systems and integrate data across sites by adopting modular platforms, enabling real-time process visibility, and supporting mission-critical workload migration to secure cloud infrastructure.



CIOs should embed FinOps and cloud governance frameworks to optimise cloud spend, using cost-monitoring tools, hybrid workload placement strategies, and contract consolidation to avoid cost blowouts and ensure sustainable digital scale.



CIOs should harden application security by embedding secure-by-design practices, conducting automated security testing (SAST/DAST), and aligning industrial control software to the ACSC's Essential Eight maturity targets.



CIOs should expand cyber and digital skills internally by launching targeted workforce development programs for OT-IT convergence roles, including automation, edge computing, and cyber operations.



CIOs should rewire sourcing models and supplier relationships by applying ESG, security, and resilience criteria to vendor selection and embedding contract flexibility to support innovation, compliance, and cost predictability.

Call to action

For Australian heavy industry CIOs

1

Optimise cloud & infrastructure spend

Heavy industry CIOs should adopt FinOps practices, right-size cloud and hybrid infrastructure usage, and consolidate vendor contracts to curb cost overruns—redirecting savings to frontline innovation and cyber resilience.

2

Modernise high-risk legacy systems

To improve asset uptime and reduce safety risks, CIOs must replace aging, high-dependency platforms with modular, API-connected systems that support predictive maintenance, real-time data flows, and supply chain coordination.

3

Strengthen in-house engineering & cyber capability

CIOs should invest in cross-skilled engineering teams, automation specialists, and OT security talent—building internal capability to reduce vendor reliance, accelerate remediation cycles, and improve operational control.

Engage with ADAPT's expert analysts for deeper insights on aligning your products with heavy industries business needs, enhancing market relevance, and achieving competitive differentiation. Access related research notes on these critical topics to support your next strategic moves:

[Read more here](#) →

Strategic questions to ask today

Application modernisation and integration

- Which legacy OT or ERP systems create the most downtime or integration bottlenecks?
- Are we standardising APIs and platforms across business units to enable operational scalability?

Cyber security

- Are our ICS and SCADA environments aligned to the Essential Eight and SOCI obligations?
- Do we have tested incident response protocols for OT cyber threats and ransomware attacks?

Data governance and decision-making

- Where are siloed or incomplete datasets delaying asset decisions or compliance reporting?
- Do we have a centralised governance model for operational and ESG data?

Customer and supply chain platforms

- Are our supplier or client portals digitised and mobile-ready for frontline use?
- How are we tracking delivery delays, quality, and satisfaction across digital channels?

Operating model evolution

- Which parts of IT and operations can move to shared platforms without increasing risk?
- Are we using agile methods to roll out automation and digital twins?

AI and automation

- Where can GenAI or automation augment field teams, workflows, or maintenance scheduling?
- Do we have internal capability to scale pilots into production?

Workforce capability

- Which roles face the highest digital skill gaps or automation risk?
- Are we investing enough in internal OT-IT talent pathways?

Strategic partnerships and sourcing

- Which vendors or startups can co-develop solutions aligned to our operational goals?
- Are contracts structured to support innovation, not just cost control?

ADAPT's research methodology

CIO Insights: Heavy industry

Document description

This document outlines insights from CIOs within the heavy industry sector.

Organisations in the ADAPT sample consist of:

- Mining
- Utilities
- Transportation and airlines
- Industrial services
- Manufacturing
- Construction and engineering

The statistics shown in this report cover:

- CIO priorities and Initiatives.
- Budgets and investment priorities.

CIO surveys were received in February and August of 2024.

Priorities and initiatives

ADAPT's CIO surveys in 2024 start with 2 open text questions:

1. "Please indicate the top 2 or 3 organisational goals or outcomes as you know them for the coming 12 months."
2. "Please indicate the top 3 or 4 initiatives or projects your IT organisation plan to 'build' and execute to achieve these outcomes in the coming 12 months."

ADAPT analysts use automated text processing. The open text responses are aggregated on similar themes and ranked by the frequency of themes in the response lines. The final stage of analysis is human quality assurance to ensure accuracy of categorisations.

Budgets and investment priorities

- CIOs indicate the percentage of budget that is allocated to different areas. The comparisons shown in this report are the average allocation across all CIOs and the compared industry.
- Investment priorities denote the intent of CIO to spend on items from a list a list of approximately 120 investment options. The figures shown in this report is the top 10 investment priorities ranked by the proportion of CIOs investing within the next 12 months.

Notes on sample sizes

Why does sample size matter?

Each set of statistics is unique with measures, distribution, variance and sample size. It is generally accepted in statistics that as sample size increases, analysts make fewer assumptions about the data, resulting in statistics that more accurately represent the truth.

ADAPT endeavours to provide transparency of sample size, whereby we provide a source on data slides with the number of respondents and the survey where those respondents come from. In data and insights slide decks, ADAPT usually provides some insight on the breakdown of the demographics at the end of the slide deck.

To protect privacy, ADAPT does not release lists of individual respondents to surveys.

For sector, segment and persona comparisons

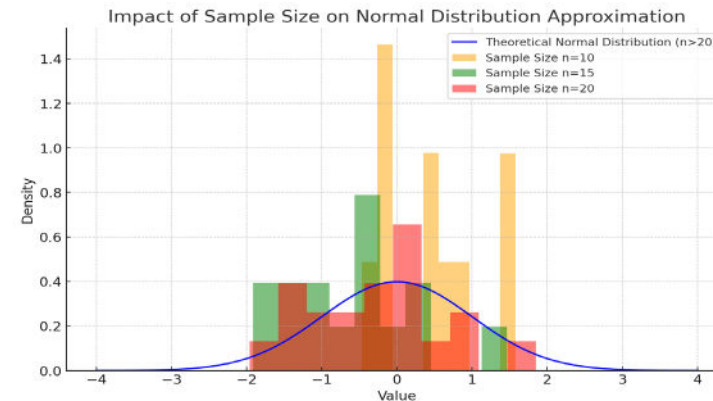
Central limit theorem a fundamental concept in statistics that determines when a sample size is large enough to be considered reliable. There are different formulas and some debate amongst statisticians about the appropriate sample size. For industry comparisons or other subset analyses, a sample size of ($n > 20$) is generally considered acceptable for drawing meaningful insights. This threshold aligns with common statistical practices, where a sample size of 20 to 30 is generally the minimum needed to assume a normal distribution of the data.

Sample sizes below 20, but equal to or greater than 15

When the sample size is between 15 and 20, while not fully representative, it can still offer valuable insights into trends. These statistics should be viewed as indicative, highlighting general directions in industry efforts or barriers to investment but treated with some caution due to the smaller number of observations.

Sample sizes less than 15, but greater or equal to 10

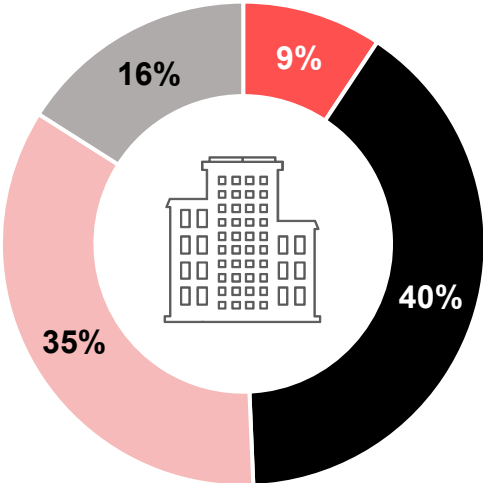
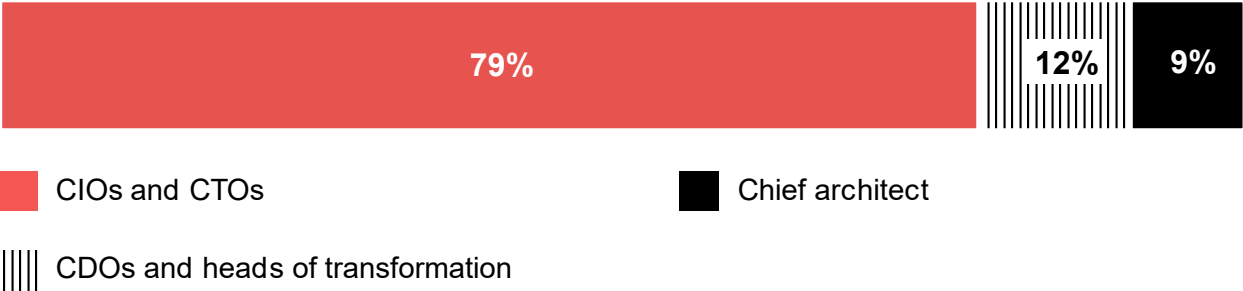
For samples between 10 and 15, the data provides a snapshot guideline only. While such small samples can show early trends, it's important to recognise that this does not guarantee future respondents will reflect the same trends. For instance, while 100% of respondents in a sample of 10 might invest in AI, it would be unrealistic to assume this pattern will hold as the sample size grows. However, if the sample size increases to 20, it is unlikely that the trend will change drastically, and the next 10 respondents will have no investment.



Survey demographics

Survey Demographics: Heavy Industries

70
respondents



- Small / medium organisations**
Up to 500 employees
- Mid-sized organisations**
501 to 2,500 employees
- Enterprise-sized organisations**
2,501 to 10,000 employees
- Large enterprise-sized organisations**
More than 10,000 employees



9% of Australia's
A\$1.9t GDP

Combined unique organisational revenues of over **A\$165.6b**
See methodology for further details



2% of the Australian
workforce

Combined unique workforce employed of over **270k**

Written by



Pooja Singh

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Pooja is a trusted adviser to Australia's mining, energy, utilities, and construction sectors — guiding CIOs and operations leaders through AI, data analytics, and digital infrastructure transformation. She specialises in modernising legacy systems, strengthening operational resilience, and driving cost-effective innovation across critical industrial environments.

Her expertise spans OT-IT convergence, cloud optimisation for hybrid environments, and the application of AI in asset performance, safety monitoring, and predictive maintenance. Pooja helps C-suite executives and digital teams navigate regulatory complexity, manage cyber risk, and make strategic investment decisions to future-proof operations.

With a background in biotech engineering and an MBA from Johns Hopkins University, where she focused on industrial technology leadership and sustainability, Pooja brings deep insight into both Australian and global heavy industry dynamics. She has previously advised global enterprises at Bain & Company and served as a principal analyst at Gartner, delivering strategic guidance on automation, cyber maturity, and industrial digital platforms.

Beyond her professional work, Pooja supports social impact initiatives in workforce equity, digital inclusion, and sustainability. Her recent project focused on upskilling frontline women in STEM-adjacent roles across regional industrial hubs — bridging the gap between automation and inclusive employment in heavy industries.

About ADAPT

ADAPT is a specialist Research & Advisory firm providing local market insights and benchmarking data to Australia and New Zealand's senior technology and business community.

Since 2011, we've been empowering the leaders of the region's top enterprise and government organisations to stay at the forefront of modern trends and build for the future. Our industry leading conferences, private roundtable events and custom research projects equip business leaders with the knowledge, relationships, inspiration and tools they need to make better strategic decisions.

A D A P T

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Data Validation

Results contained in this report (Report) are based on survey responses as provided by our clients and publicly available information. ADAPT does not subject the data contained in the Report to audit or review procedures or any other testing to validate the accuracy or reasonableness of the data provided by the participating clients. While we do not manipulate the survey responses, we do make an effort to identify outlier data or conflicting results that could lead to misinterpretations before the preparation of the Report.

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